

Entering a Relocation

1. Find Client -- *Always make sure all necessary info is on the application screen*
2. Service Screen – add new service – relocation application
 - a. Date: date applied for services
 - b. Service/Activity Title
 1. TAA services
 2. TAA – Relocation application and approval
 - c. Funding Stream: TAA
 - d. Summary Description: relocation assistance
 - e. Planned End Date: date application submitted
 - f. Service Note: circumstances surrounding relocation
3. Service Screen – add new service – relocation reimbursement
 - a. Date: date applied for services
 - b. Service/Activity Title
 1. TAA services
 2. TAA – Relocation reimbursement submitted
 - c. Funding Stream: TAA
 - d. Summary Description: relocation assistance
 - e. Planned End Date: date application submitted
 - f. Service Note: circumstances surrounding relocation
4. Case Notes: document eligibility for and decision to approve relocation

HINT: You can group several like transactions so you can cut and paste your service notes.

Send relocation plan to state TAA for approval, payment and inclusion in the file.